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Bid, Payment & Performance Bond Assessment Form

<b>1. WHY DID YOU CONTACT CCI SURETY?</b> (mark all that apply)	Referred? Company? _____	Marketing? Call      Email	Past Business? Contract Bonds	Web Search? Search Words?
	Individual? _____	Visit      Other	Comm. Bonds	

<b>2. CONTRACTOR INFORMATION</b>	Company Name (As Appears on Bond)		Business Phone # :	Email :
Company Address:	City:	State:	Zip Code:	Annual Business Income:
Current Ownership Since:	<input type="checkbox"/> Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation <input type="checkbox"/> LLC	Date Formed	# of Owners, Partners or Mem.	FED ID #
Previous Surety:	Reason For Changing Surety:			
Approximate Business Net Worth:	Largest Completed Contract:		Largest Completed Program:	

<b>3. PROJECT INFORMATION</b>	Contract/Bid Amount:	Bid and Date Time :		Bid % :
Project Owner/ Obligor: Obligee Address:	Start Date:	Completion Date:	Maintenance Period:	Liquidated Damages:
Bond Form (Please Attach) AIA    Federal    Other    _____	Approx. % Subcontracted:	#Approx. % Materials:	Est. Gross Profit?	
Job Description				

<b>4. BID SPREAD INFORMATION</b> (next 3 contractor bids, Name – Bid Amount)	
1.	\$
2.	\$
3.	\$

<b>5. BANK REFERENCE</b>	Contact Name:	Line of Credit Limit:	Date of Information:
Bank:	Phone or Email:	Current Outstanding:	Expiration/Renewal Date:

<b>6. LARGEST COMPLETED PROJECTS</b>				
Project Name: Project Description:		Contract Amount:	Completion Date:	Bonded? Yes    No
Owner:	Contact:	Phone/Email:		Project Location (City/State):
Project Name: Project Description:		Contract Amount:	Completion Date:	Bonded? Yes    No
Owner:	Contact:	Phone/Email:		Project Location (City/State):
Project Name: Project Description:		Contract Amount:	Completion Date:	Bonded? Yes    No
Owner:	Contact:	Phone/Email:		Project Location (City/State):



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<b>7. INDEMNITORS</b>		Provide the information for all owners – use additional sheets if necessary			
Name:	Social Security:	% Ownership	Net Worth: (Exclude Business)	Do You Own Real Estate?	Assets in Trust?
Spouse:	Social Security:	% Ownership	Yes No	Yes No	Yes No
Adress:		Are you a partner/office in any other venture? Yes No If yes, name of venture:			
Name:	Social Security:	% Ownership	Net Worth: (Exclude Business)	Do You Own Real Estate?	Assets in Trust?
Spouse:	Social Security:	% Ownership		Yes No	Yes No
Adress:		Are you a partner/office in any other venture? Yes No If yes, name of venture:			

<b>8. ADDITIONAL INFORMATION</b> – You may be asked to provide additional information to expedite bond approval		
Do you currently work with a CPA? Firm Yes No Name:	Type of Financial Reports available? (check all applicable) In-House CPA Compiled CPA Reviewed	CPA Contact: Name: Phone:
Do you have Legal Representation? Yes No	Name of Law Firm: Name of Contact:	Phone: Email:

**Credit Release Authorization:** I/we authorize Construction Capital, Inc. and/or CCI Surety, Inc. to investigate the information contained with any and all information submitted including, but not limited to the application, financials, etc. with any and all creditors and/or lending institutions and prior Surety credit.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
NAME & TITLE

\_\_\_\_\_  
DATE

\*Bid bonds require copy of bid specifications.

\*Performance/Payment bond require copy of the contract